

Documenting a Job Performance Problem

I. Document the Problem

The supervisor should write down specific information regarding performance problems. Complete and accurate documentation will enable a supervisor to:

1. Be objective, fair and consistent.
2. Present factual and objective information that gives the employee a clear picture of their job performance.
3. Prepare a written plan for corrective action. Documentation is necessary if disciplinary action is taken.

Documenting the facts and your observations will help establish specific patterns of performance concerns, and provide a solid foundation of information to refer to when addressing them

II. Documentation should:

1. Be clear, concise, objective and include:
 - What-factually record what occurred
 - When-specify date and time of incident
 - Who-identify all individuals or witnesses involved
 - Outcome-What was the result or impact of the incident, such as”
 - ✓ Breach of personnel policy
 - ✓ Results of not meeting specific job requirement
 - ✓ Effect on customer or staff
 - DO NOT use negative labels describing the incident, such as “stupid, dumb, and lazy. Rather, stick to the facts.

III. **Consult your human resource representative/manager** - to delineate a corrective action plan in line with personnel policy and procedure.

IV. **Call the EAP for consultation** - should a job performance referral be indicated. Provide Information regarding the situation, including the nature and history of the work problem/s and any corrective steps that you and other personnel initiated. The EAP Coordinator will advise as to how to proceed.

V. **Meet with the Employee**- Schedule a meeting to communicate concerns, consequences, a corrective action plan (**Performance Improvement Plan**), timeline for improvement, and EAP referral if indicated. Monitor the employee’s performance at appropriate intervals and meet regularly to review progress